

Cerner Training

Kim Johnson



Verify Case/Encounter

Zttest, Kim

Zttest, Kim

Allergies/Allergies Not Recorded

Chart - Standard

40y F Birth Sex | DOB: 12/26/1981 | MRN: 10433 | PCP

Visit: 3/14/2022 8:41:53 AM MDT | DaVita Care Coordination | RH23872 | OCC - CIO

WT | Ht | BMI | Tobacco: Not recorded | IAP | G00000003 | Problems

1-Gentl CCCC - MC of Georgia | Phone - | 455 Main Street Columbus, GA 3182... | Adv Dr: Not recorded | Patient Portal: Not Invited | Results PH: N...

Full screen

Print

1 minutes ago



Patient Summary mPage

Summary | Active Case | Close Case | Workflow | Consents | Forms (77) | Activity Log (2) | Media (0) | Filter applied

Full screen | Print | 2 minutes ago

Summary

Zttest, Elvis Presley
71 Years M DOB: 11/01/1950
Patient Portal: No

Race: Unknown/Unreported
Ethnicity: Not Hispanic or Latino
Preferred Language: English

Addresses (1)
Home: 123 Mallory Lane
Miami, FL 33101

Phone (2)
Mobile: (555) 555-4444
Home: (703) 123-4568

MRN (1)
MRN: 75307
person_id: 75611432, extn_id: 379531377

Health Plan(s)

Active 2 Inactive

Primary: Govt CKCC - ITC of Georgia
Member: 1481C1DE11
Group: --
Policy: --
Type: Medicare
Financial Class: Medicare
Address (1): x, x, x, Ga, x (Billing)

Secondary: Humana

Consents

Patient Privacy: Consent N/A (NOP Acknowledged)
Consent for External Rx History: Consent Granted
Consent for HIE Information Exchange: Consent N/A (NOP Acknowledged)
Consent for Immunization Recall/Reminder: --
Consent for Immunizations to Providers: --
PHI Disclosure Restrictions: --

Consent Documents (Last 10 years)

Consent (Electronic Data Exchange)
Consent (Media)
Consent (NPI)
Consent Forms

03/04/2022
03/09/2022
03/09/2022
02/22/2022

Providers

Lifetime
2 Active | 1 Inactive
Nephrologist (1)
Primary Care Physician (1)
This Visit
4 Active | 0 Inactive
Mid-Level Access: Quidilla NP, Marialuisa
Clinical Access: Mitchell CC, Nadine
Clinical Access: Copp CC, Kanisa
Assigned Care Manager: Johnson, Kimberly
Other Care Providers and Ancillary Services (0)
No results found

Forms (77)

Display: Last 2 Years Status: Active

Form

Charted By Date

Patient Activation Measure (PAM) 03/12/22*
OH Hospitalization Record 03/09/22
OH Health Risk Assessment 03/09/22
Appointment Tracking 03/09/22
Appointment Tracking 03/08/22
Depression Screening 03/07/22
Patient Activation Measure (PAM) 03/03/22*
Patient Activation Measure (PAM) 03/02/22
Morse Fall Risk Scale Score 03/02/22
Functional Assessment EBN 03/02/22
CAGE Assessment 03/02/22
Vitals/Measurements 03/02/22
Depression Screening 02/25/22
Vitals/Measurements 02/25/22

Activity Log (2)

Selected Visit

Date/Duration Method/Type Outcome Contact/Contact Type Created By

03/09/2022 14:48 Onboarding - Nephrologist Case discussion Johnson, Kimberly
(-- min)

02/25/2022 14:34 Phone call Case discussion Zttest, Elvis Presley (Patient)
(-- min)

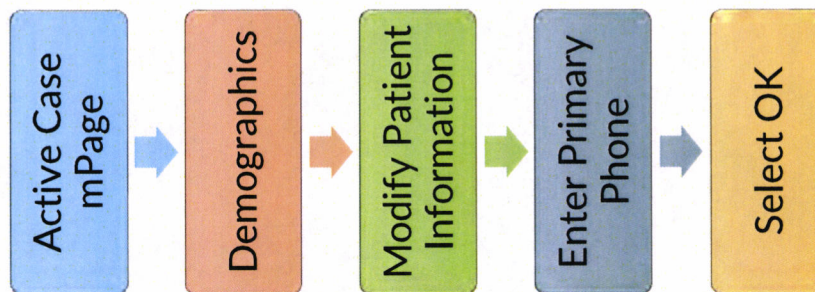
Care Team

Role / Relationship Contact
Cross Visit Johnson, Kimberly
Care Manager

Manage Case

Case Details
Program: DKK/Villare Health
Referral Source: --

Add Patient Phone Number



Active Case mPage

Demographics

Modify Patient Information

Enter Primary Phone

Select OK

Summary

Demographics

Information

Addresses

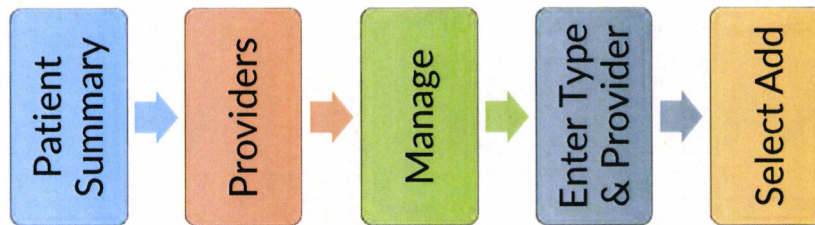
Care Team

Modify Patient Information

Primary Phone

OK

Add Lifetime Providers



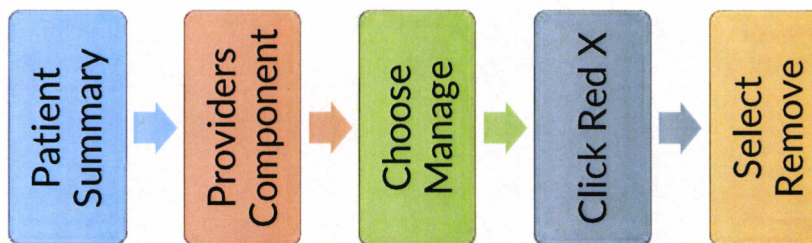
The screenshot displays the 'zzHealthcare' software interface. The top navigation bar includes options like 'Home', 'Patient', 'Chart', 'Links', 'Help', 'Input Request', 'Add', 'Close Case', 'Demographics', 'Input', and 'Communicate'. The main content area is divided into several sections:

- Patient Summary:** Displays patient information for 'zzHealthcare, Megan' (DOB: 01/01/1980, SSN: 123-45-6789, Address: 1234 Main St, Anytown, IL 60001).
- Providers:** A list of providers associated with the patient, including 'zzHealthcare, Megan' (Primary Care Physician), 'zzHealthcare, John' (Nurse Practitioner), and 'zzHealthcare, Sarah' (Registered Nurse).
- Manage:** A section for managing provider information, including fields for 'Provider Name', 'Provider Type', 'Provider Address', and 'Provider Phone'.
- Lifetime Relationships:** A form for adding new lifetime providers, with fields for 'Relationship Type', 'Provider Name', 'Provider Address', and 'Provider Phone'.

A dark blue callout box with a star icon points to the 'Lifetime Relationships' form, containing the text: 'PCP, Nephrologist & Dialysis Center & Specialists'.



Remove Lifetime Providers



Patient Summary
zzHealthCare, Megan
 10/7/1995
 10/7/1995 11:53:00 AM EDT | 10/7/1995 11:53:00 AM EDT | 10/7/1995 11:53:00 AM EDT | 10/7/1995 11:53:00 AM EDT

Providers
 Lifetime
 Manage

Unchart Relationship
 Unchart the Relationship?

Current Responsible Provider Relationships (1):

Name
 ZZCHR Provider, Provider

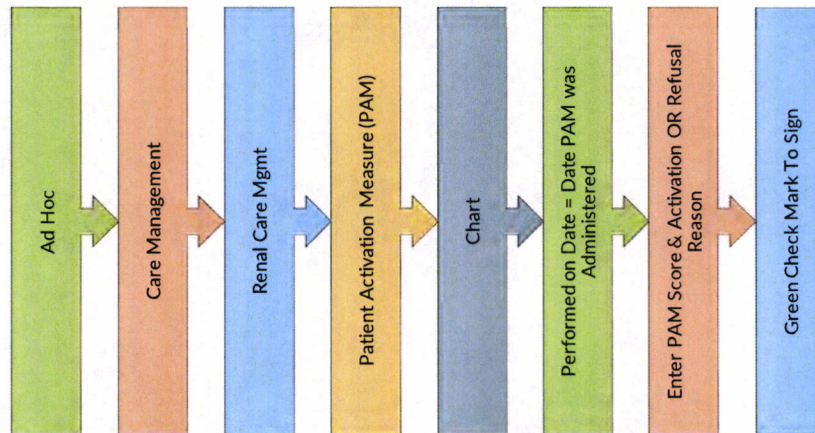
Location
 --

Added
 09/29/2011

Entering PAM Score

PowerChart

Entering PAM Score



Charges: Ad Hoc

Ad Hoc Charting - Ztrest, Christina Aguilera

1 2 3 4 5

Appointment Tracking
☐ BH Study Plan
☐ CARE Assessment
☐ CHE Outreach
☐ CDT Trng Risk of Transition
☐ DM Advanced Care Plan
☐ DM Engagement and Program Training
☐ DM Health Risk Assessment
☐ DM Hospitalization Record
☐ Cognitive Assessment
☐ Complex Case Review
☐ Conterial Risk Score
☐ CSRS Review: Recent, with Trng, To Complete and Follow
☐ Diabetes Screening
☐ Diabetes Transitions
☐ First 90 Days Patient Assessment
☐ Functional Assessment EHR
☐ Mini Cog Test
☐ More Fall Risk Scale Score
☒ **Patient Activation Measure (PAM)**
☐ Pain Assessment
☐ Patient Information
☐ Risk Stratification Score
☐ Transcribed Lab Results
☐ VA Model of Care

By: Johnson, Kimberly

Performed on: 03/10/2022 1:47 MST

Patient Activation Measure (PAM)

Please CHANGE the above data to the date the PAM was completed.

Score:

Activation Level
☐ PAM Activation Level 4
☐ PAM Activation Level 3
☐ PAM Activation Level 2
☐ PAM Activation Level 1

Level 4 - Maintaining behaviors and pushing further
 Level 3 - Taking action and gaining control
 Level 2 - Becoming aware but still struggling
 Level 1 - Disengaged and overwhelmed

Refusal Reason
☐ Caregiver unavailable
☐ Patient refused
☐ Other

Chart

Uploading Consent

PowerChart



Collect consents

Use approved scripting on tip sheet to introduce and obtain signatures on the following patient consent forms; upload and assign consent document type in Cerner (demo)

Document Name	Document Purpose	Cerner Document Type
Authorization to Disclose to IKC	This allows DaVita IKC to receive records from other providers	Outside Records
Health Information Exchange (HIE) Opt-In	This allows DaVita IKC to utilize HIE to receive patient health information – dependent on state	Consent (Electronic Data Exchange)
Digital Communications	Allows DaVita IKC to use email communications and leave detailed voicemails.	Consent (Media)
Notice of Privacy Practices	This details the privacy practices of DaVita IKC and is required to be presented to patients prior to CHE.	Consent (NPP)



Note | Scan | Import

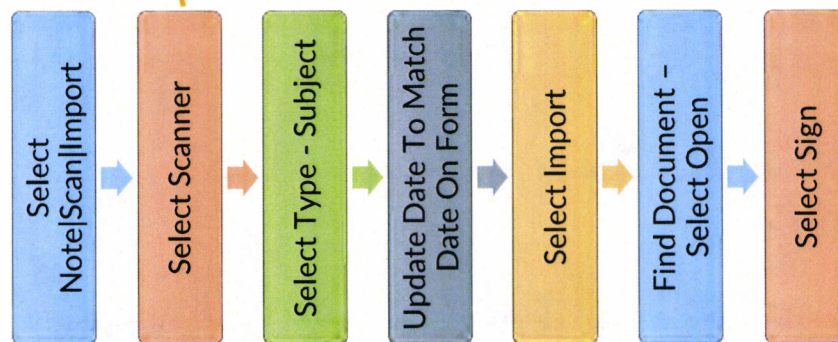


Chart - All

- Summary
- Outside Records
- Pregnancy Summary
- Flowcharts
- Provider Documentation... + Add
- Media + Add
- Diagnoses and Problems + Add
- Allergies + Add
- Medications + Add
- Orders | Charges + Add
- Histories
- Immunizations
- Growth Charts
- Tasks
- MAE Summary
- Recommendations
- Direct Charting

Note | Scan | Import

No results found.

By type
By status
By date
Performed by
By encounter

Add Document: Zztest, Shawna - 10000

Last 100 Documents : 0 out of 0 documents are accessible. (Document Count)

*Type: [Yellow Box] *Author: Montis, Andree

*Date: 12/24/2020 1033 MST Status: In Progress

Subject: [Empty Box]

Associated Providers: [Empty Box] Modify

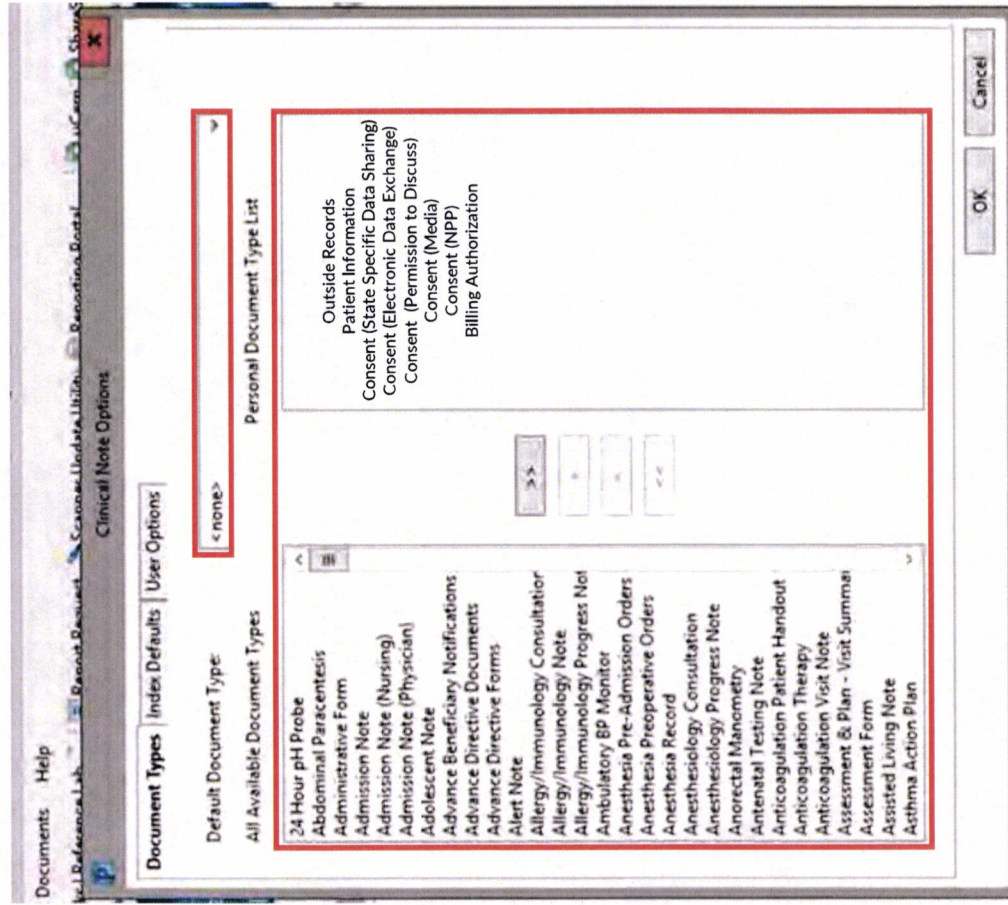
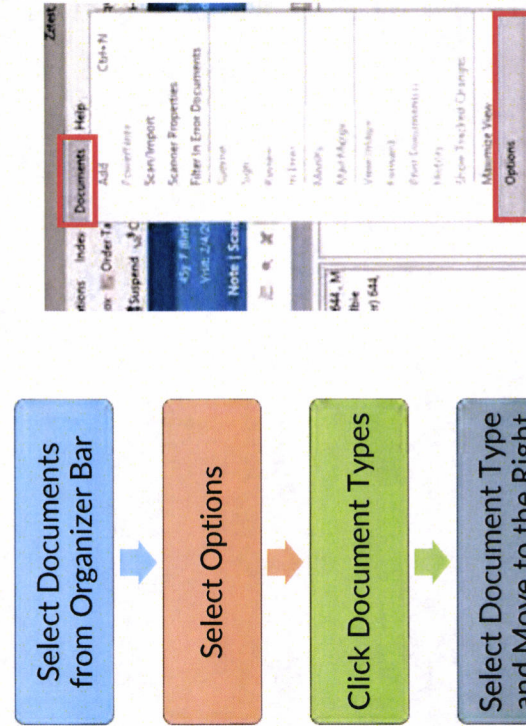
Anal [Empty Box]

10 [Empty Box]

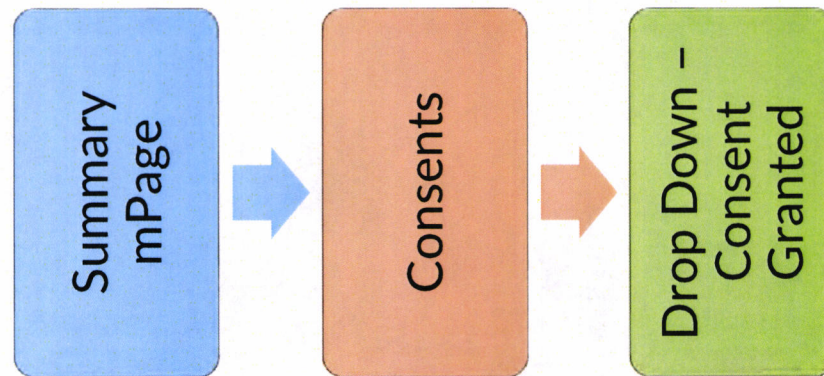
Sign Import Save & Close Save Scan Paste File Cancel



Personal Document Types



Cerner Consent Opt-In



Consents + ▾

Patient Privacy: Consent
Consent for External Rx
Consent for Life Insurance
Consents for Information Exchange

PHI Disclosure and Use Restrictions
All Forms...

Receive External Prescription History (Claims and Dispense History Provided by SureScripts)
Please indicate if the patient has provided written consent for receiving Prescription history information. If consent has not been obtained or has changed from the current status, please update accordingly.

Real-time service provided by SureScripts. Patient matching based on patient's name, first name, DOB, gender and zip code.

Submit Clinical Information to Health Information Exchanges (Release of Information)
Does the patient give the practice consent to electronically share the patient's demographic and clinical information externally?

Submit Immunization Information to Registries (Release of Information)
1. Does the patient give the practice consent, or does the practice have the right based on state requirements, to electronically share immunization information with appropriate immunization registries?
2. Would the patient like to be contacted directly concerning immunization needs/recalls or reminders of upcoming immunizations by the appropriate immunized registry?

Consent Disclaimers and Informations:
By selecting "Yes," or "Consent" on any of the above options, the practice is affirming that they have fulfilled all other local, state, and federal requirements concerning the above consents.

Prior Responses to Consents for Information Exchange

Consent for Clinical Info Exchange: Consent Granted (09/01/20 10:42:00)
Consent for External Rx History: Consent Granted (09/01/20 10:42:00)

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Opt-In States

- California
- Connecticut
- Florida
- Hawaii
- Idaho
- Indiana
- Louisiana
- Massachusetts
- Michigan
- Minnesota
- Missouri
- Montana
- Nevada
- New York
- Oklahoma
- Oregon
- Rhode Island
- Tennessee
- Texas
- Utah
- Virginia
- Washington

Activity Log/Communication Event

Activity Log

→

+ Sign

→

Update Date & Time

→

Method

→

Contact Type

→

Notes

→

Save

Activity Log (2)

+

Selected Visit

Last 24 hours

Last 1 weeks

Last 1 months

v

Date/Duration	Method/Type	Outcome	Contact/Contact Type	Created By
03/09/2022 14:48 (- min)	Onboarding - Nephrologist	Case discussion	-- (Medical facility)	Johnson, Kimberly
02/25/2022 14:34 (- min)	Phone call (Inbound)	Case discussion	Zarest, EMS Presley (Patient)	Johnson, Kimberly

Save

Cancel

Add Communication Event

Date

03/09/2022

Time (24-hr)

12:33

Duration (min)

Method

Onboarding - Nephrologist

Contact type

Medical facility

Contact name

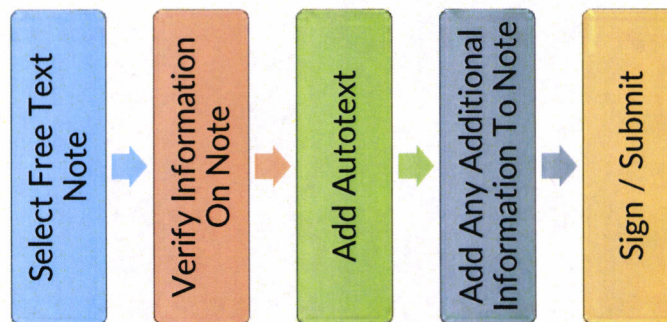
Outcome

Case discussion

NOTES

PAN entered & Consents Uploaded

Create Note



Create Note

Case Summary Note

Care Plan Note

Free Text Note

Select Other Note

+ Add - [Icons] List

Free Text Note X List

Tahoma - 9

Patient Information

Name: Zzzest, Elvis Presley
Address: 123 Mallory Lane
Miami, FL 33101

Sex: Male
Date of Birth: 11/01/1950
Phone: (703) 123-4568
MRN: 75307
FIN: 65984
Location: Davita Care Coordination
Date of Service: 02/22/2022
Primary Care Physician: SMITH, JOHN, (408) 358-3448

.ckcd

[ckcdhandoff](#)
[ckcdincomingcall](#)
[ckcdoutboundcall](#)
[ckcdunengaged](#)

Sign/Submit

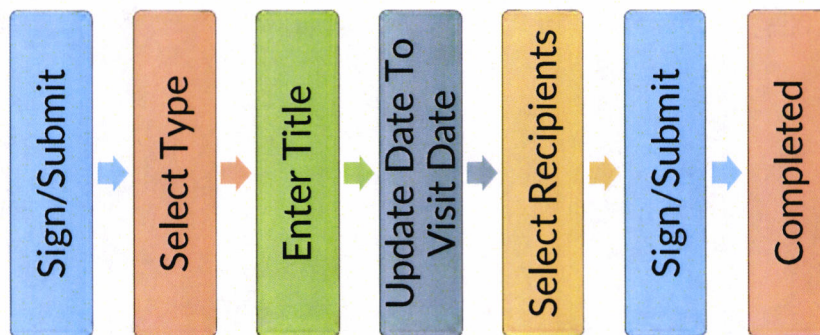
Save

Save & Close

Cancel



Sign



aspirin 81 mg oral tablet, chewable, 81 mg= 1 tab(s), Oral, daily
 calcium acetate 667 mg oral tablet, 2001 mg= 3 tab(s), Oral, bid
 clobutolone 0.1 mg oral tablet, 0.1 mg= 1 tab(s), Oral, bid
 furosemide 40 mg oral tablet, 40 mg= 1 tab(s), Oral, daily
 Lantus 100 units/mL subcutaneous solution, 6 unit(s), Subcutaneous, hs
 losartan 25 mg oral tablet, 25 mg= 1 tab(s), Oral, daily
 Rena-Vite oral tablet, 1 tab(s), Oral, daily
 Velporo 2500 mg (500 mg elemental iron) oral tablet, chewable, 500 mg= 1 tab(s), Chewed

Allergies
 naloxonium containing compounds (Ntrhina)

Sign/Submit Save Save & Close Cancel

Sign/Submit Note

Type: Contact Note **Note Type List Filter:** All

Author: Johnson, Kimberly **Title:** Patient Onboarding Call

Date: 3/9/2022 1242 CST

☐ Forward Options ☐ Create provider letter

Recipients

Default Name	Comment	Sign	Review/CC
Curry, Ryan			
Unspecified - E...			
Morris, Andrea			
Unspecified - E...			
Snyder, Justin			
Unspecified - E...			

Contacts

Default Name
Curry, Ryan
Unspecified - E...
Morris, Andrea
Unspecified - E...
Snyder, Justin
Unspecified - E...

Sign/Submit **Cancel**

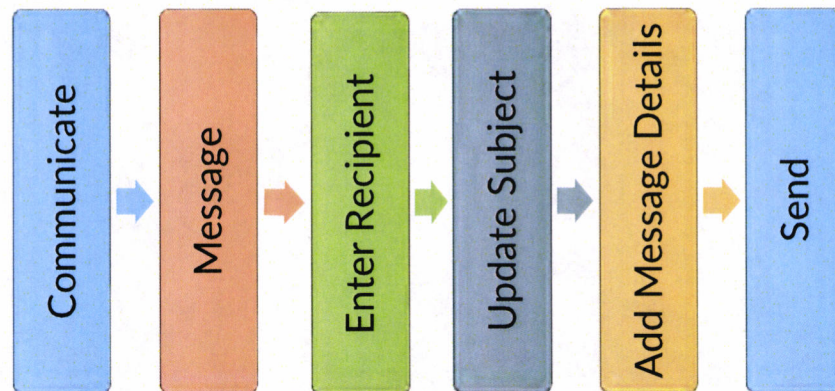
Communication

PowerChart





Messaging



Task Edit View Patient Chart Links Notifications Navigation Help

Communicate AdHoc New Sticky Note View Sticky Notes Tear Off Charges

Supervisor Dashboard Inbox Order Tasks Reference Lab MyExperience

New Message

Launch Orders

Message View Summary View

Task Edit

Notify Message Journal (1) Portal Options

Patient: Zweist, Tyree Caller: Zweist, Tyree Caller #: H (615) 100-1001

To: Snyder, Justin X

CC: [Empty]

Provider: [Empty]

Subject: [Empty]

Attachments: [Empty]

Other Attachments: [Empty]

Save to Chart As: General Message

Include me []

To consumer []

Disable further replies []

Transition of Care []

Browse Documents [Empty]

Message Body: [Empty]

Actions:

- ☐ Notify me with results
- ☐ Notify the nurse with results
- ☐ Notify the order provider with results
- ☐ Notify the patient for appointment
- ☐ Notify the patient with results
- ☐ Notify the pharmacy with prescription(s)

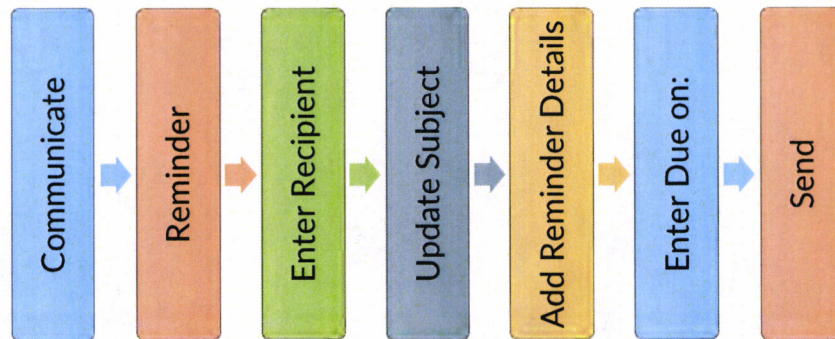
Remind on: [Empty]

Due on: [Empty]

Send Cancel



Creating a Reminder / Task



New Reminder/Task

Task Edit

High Notify Message Journal (2) Message View Summary View

Patient: Znest, Tyne Show in: Recipient's inbox Subtype: Include me

To: Snyder, Justin Provider: To consumer

CC: Save to Chart As: Reminder Message

Subject: Browse Documents Other Attachments

Attachments

Message

Reminder:

Please call patient to:

Please schedule patient for:

Please ask patient to:

Results Follow up Required for:

Actions

☐ Notify me with results

☐ Notify the nurse with results

☐ Notify the order provider with results

☐ Notify the patient for appointment

☐ Notify the patient with results

☐ Notify the pharmacy with prescription(s)

Show up: 1 minute(s) 02/11/2022 11:55 CST

Due on: minutes(s) days(s) week(s) month(s) year(s)

Send Cancel

EYNTK:
Everything you need to know

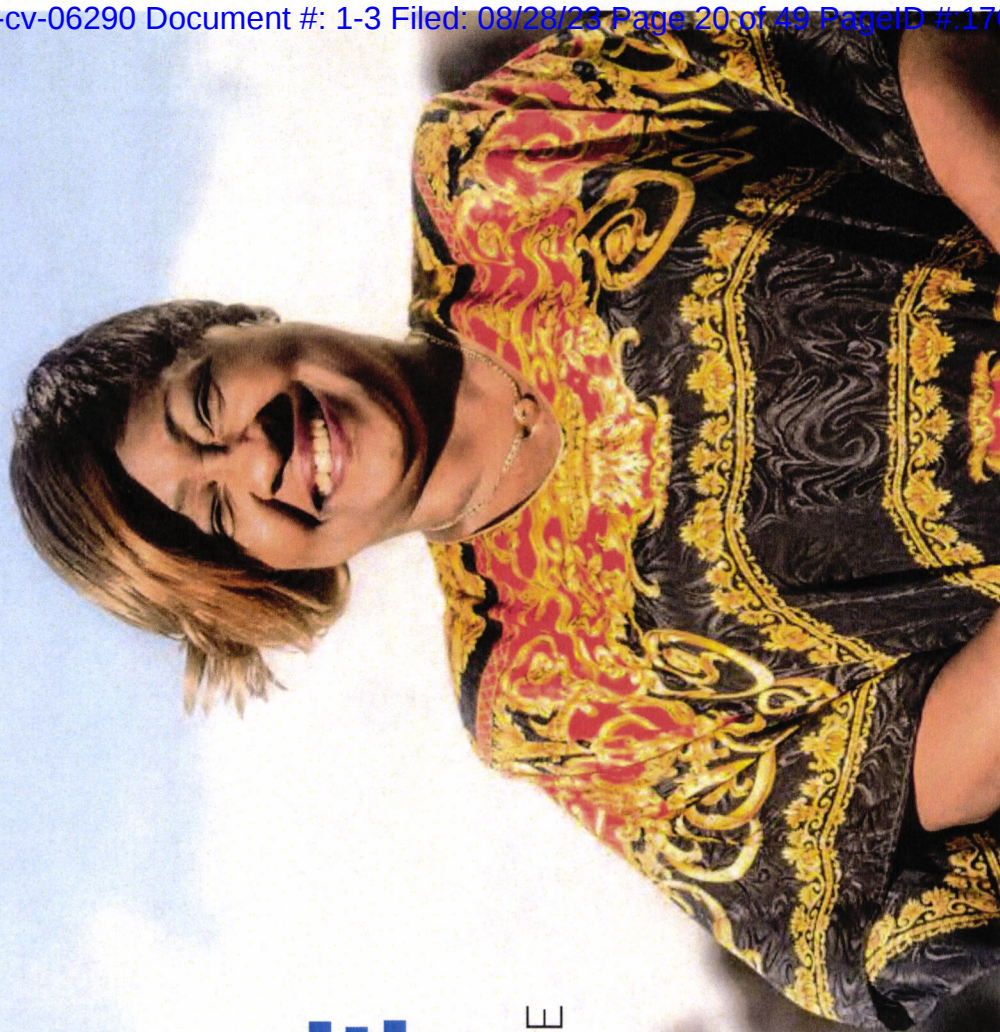
To Schedule a Telehealth CHE

Audience:

Team members scheduling a telehealth CHE



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About me!

Kelly Bowler
Senior Analyst, Provider
Strategy and Operations





TODAY'S GOAL

Provide teammates with clear directions on the steps to take to schedule a telehealth CHE



120

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EYNTK TO SCHEDULE A TELEHEALTH CHE

What is the CHE?

What is the process to schedule a CHE?

- Select a patient to call
- Call patient and invite them to complete the CHE
- Create the visit in VSee
- Create the visit in Cerner
- Confirm patient's insurance in Cerner

What do I do after the telehealth CHE has been scheduled?

What do I do during the telehealth visit?

Where can I get help?



EYNTK TO SCHEDULE A TELEHEALTH CHE

EYNTK: CHE Scheduling

- What is a CHE and what is telehealth?
- How do I select a patient to schedule?
- How do I call a patient?
- How do I schedule the visit in VSee?
- How do I schedule the visit in Cerner?
- How do I enter a patient's insurance information in Cerner?
- What do I do after the visit is scheduled?
- What do I do during the visit?
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EYNTK TO SCHEDULE A TELEHEALTH CHE

EYNTK: CHE Scheduling

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EYNTK TO SCHEDULE A TELEHEALTH CHE

What is the CHE?

The **CHE** (Comprehensive Health Evaluation) is a **tool** to facilitate completion of a **comprehensive patient H&P**.

The goal is to capture all current comorbidities and document their management plans to ensure we are addressing active patient issues.

Reason for Visit

Physical Exam

Review of Systems

Medical History

Social History

Problem List

Surgical History

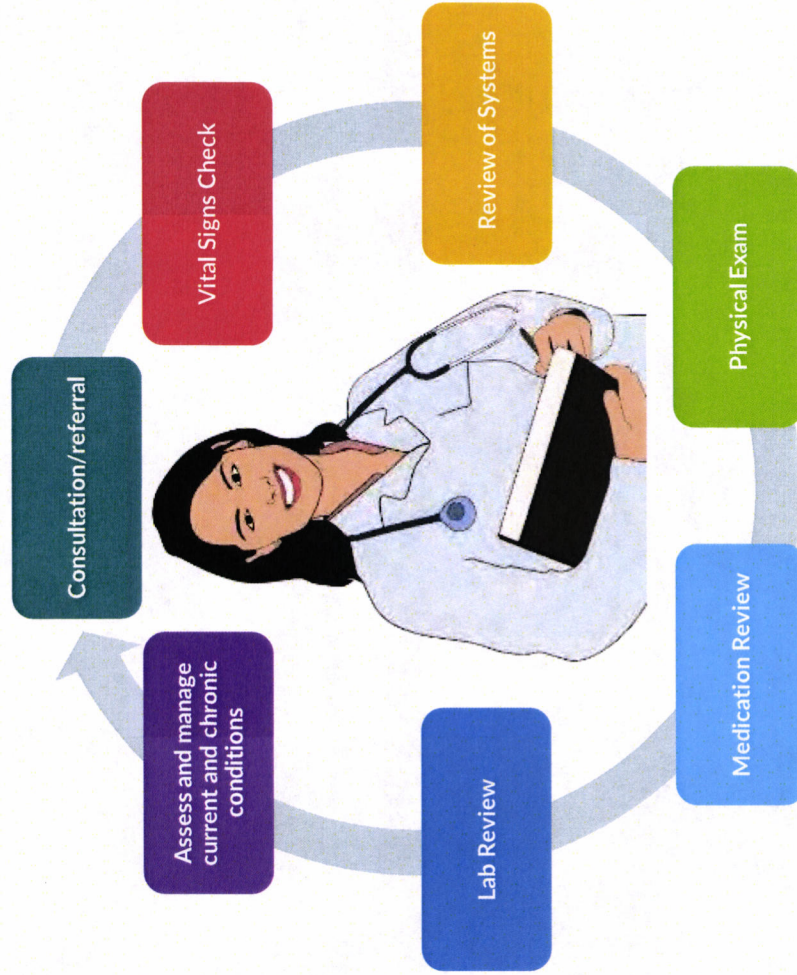
Health Maintenance/Screenings

Assessment and Plan

Discussion/Summary



EYNTK TO SCHEDULE A TELEHEALTH CHE



What is included in a CHE?



EYNTK TO SCHEDULE A TELEHEALTH CHE

Background

On April 10, 2020, CMS published that organizations that submit diagnoses for risk adjusted payment (e.g., Medicare Advantage organizations, DCE) are able to submit diagnoses for risk adjustment that are from telehealth visits when those visits meet all criteria for risk adjustment eligibility, which include being from an allowable inpatient, outpatient, or professional service, and from a face-to-face encounter.

<https://www.cms.gov/files/document/applicability-diagnoses-telehealth-services-risk-adjustment-4102020.pdf>

The following outlines the implementation and use of telehealth by the DaVita Integrated Kidney Care ("DaVita IKC") team during this public health emergency period.



EYNTK TO SCHEDULE A TELEHEALTH CHE

When to use Telehealth

It is recommended to use telehealth as a tool to reach the following patients:

- Patients not typically encountered in-clinic (HHD, PD, post-transplant, non-DaVita, CKD)
- Patients requiring multiple hours of travel time per visit
- Patients who may be infected with COVID-19, or providers who need to quarantine
- Patients who are willing and/or prefer a telehealth interaction. For example: patients who express privacy concerns regarding discussion of highly sensitive health information in the dialysis clinic
- Urgent patient issues that require a visual assessment¹
- Scenarios where the delivery of care warrants discussion with family member or care partner, or there has been a history of discrepancies with medications and the review of medication bottles is required
- When due to program requirements or restrictions

¹ A condition is considered urgent when it is not life threatening, but does require care in a timely manner (within 24 hours). Examples include conditions which could deteriorate such as febrile illness or are not bearable due to discomfort such as back pain. Telehealth should not be utilized for emergent care – please refer to slide 74. Emergent care is medical care that directly addresses threats to life, limb, or eyesight. Examples: possible heart attack or stroke, gunshot wounds, major motor vehicle accidents, open fractures, appendicitis, severe allergic reactions that make it difficult to breathe, or severe bleeding that does not stop with 10 minutes of direct pressure.

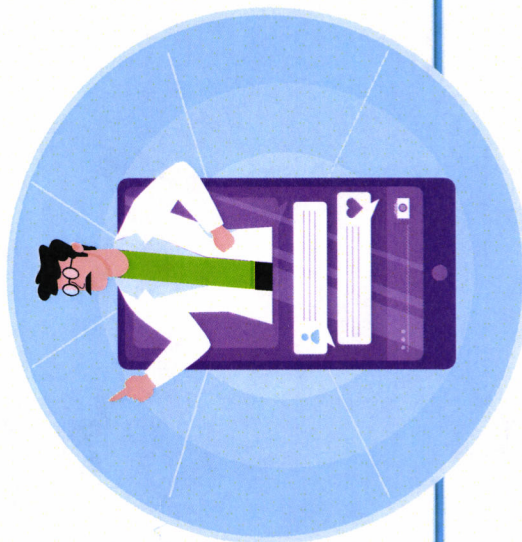


EYNTK TO SCHEDULE A TELEHEALTH CHE

DaVita IKC's Telehealth Platform

VSee Clinic is be our telehealth tool to allow for remote interactions.

- All telehealth encounters should be completed using VSee Clinic
- No other applications should be used in the provision of DaVita IKC telehealth by covered health care providers unless explicitly approved
- Check the VillageWeb for the most up-to-date information on additional approved telehealth backup platforms



Welcome

Current number of patients waiting: 0
 (Please do not interrupt the session until 5:15)



Kristina Aven
 Endocrinologist
 ● Offline

For Providers Help Exit Computer

Remote ID# 2

ENTER WAITING ROOM

VSee



EYNTK TO SCHEDULE A TELEHEALTH CHE

EYNTK: CHE Scheduling

- What is a CHE and what is telehealth?

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- What do I do during the visit?
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Last updated March 2022

EYNTK TO SCHEDULE A TELEHEALTH CHE

What is the priority of scheduling CHEs for CKCC patients?

01

Pts who were onboarded at Point of Care (PoC) and only need CHE scheduling



02

Pts who mailed back completed consents and only need CHE scheduling



03

All other patients who need end to end onboarding





Last updated March 2022

EYNTK TO SCHEDULE A TELEHEALTH CHE

How do I prioritize my patient list for CHE scheduling?

Use the "CHE Scheduling" tab of the CKCC CKD patient onboarding report to identify patients to schedule for a CHE.

In Q1, Q2 of 2022, CHE scheduling is driven by operational prioritization factors:

- Automatically happens in onboarding report!

01

Type of onboarding: Pts who received PoC onboarding are highest priority for CHE scheduling
- 02

Not receiving a neph led CHE: As of March 2022, KSOSN CKD patients will be receiving a CHE from their nephrologist and do not need to be scheduled. Be on the look out for additional information from your market leadership as additional practice choose to participate..
- 03

Consent completion: patients with consents already completed are highest priority for scheduling
- Ask your ROS/ROM/NP Manager for direction.

04

NP availability: NPs who are CHE ready and have availability in next 45 days for a CHE. If the NP is not CHE ready, do not contact the patient to schedule CHE

130



EYNTK TO SCHEDULE A TELEHEALTH CHE

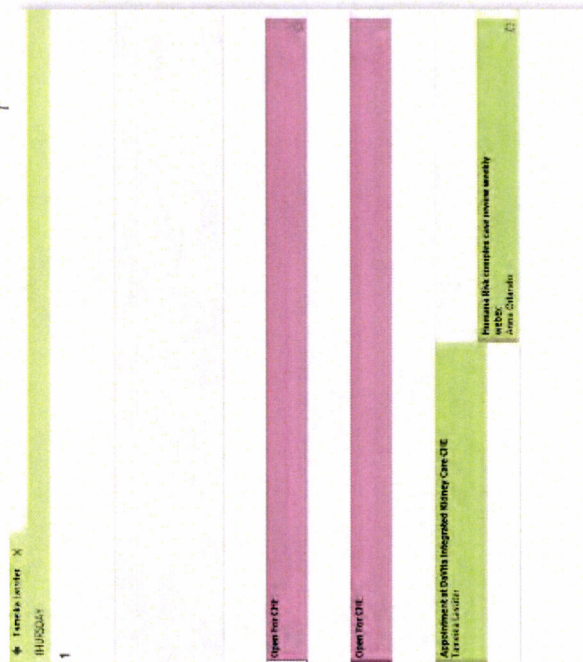
Once a patient is selected, confirm the following items before starting to schedule the patient for a CHE:

1. The NP that is aligned to the patient is "CHE ready"
2. The NP that is aligned to the patient has availability in Outlook for the next 45 days for a CHE
3. The NPP (Notice of Privacy Practice) has been uploaded to Cerner or just obtained via digital consents
 - If there is no NPP in Cerner, use the script and steps on the NPP Job Aid and upload a blank NPP to the patients chart after scheduling the CHE



EYNTK TO SCHEDULE A TELEHEALTH CHE

Does the NP have availability in the next 45 days? Check the NP's schedule in Outlook:



1. Select the NP Calendar that you need to schedule with
2. Look for any "Open for CHE" marked time slots.
3. Time will be in your set time zone
4. Align your time zone with the NP availability for CHE and confirm with Pt in their time zone
5. Confirm CHE day and time that works



EYNTK: CHE Scheduling

- What is a CHE and what is telehealth?
- How do I select a patient to schedule?

How do I call a patient?

- How do I schedule the visit in VSee?
- How do I schedule the visit in Cerner?
- How do I enter a patient's insurance information in Cerner?
- What do I do after the visit is scheduled?
- What do I do during the visit?
- Where can I get support?



EYNTK TO SCHEDULE A TELEHEALTH CHE

How do I call a patient to schedule a CHE?



01

TM PREPARES TO CALL THE PATIENT

- Open laptop
- Navigate to NPs calendar in both VSee and Cerner
- Open the Telehealth Script

02

TM DISCUSSES WITH THE PATIENT

- What is a CHE and how a patient will use telehealth
- Patient's availability. Schedule for a time when the patient plans to be home. Visit will be up to 1 hour and 15 minutes long
- Confirmation of insurance details

03

TM DOCUMENTS

- Visit date/time on NPs calendar in VSee and Cerner. The visit should be scheduled for 1 hour and 15 minutes
- VSee visit number and patient device and browser in Cerner
- Outcome of call using CHE outreach PowerForm: patient's acceptance, refusal of scheduling a visit, or if the patient was unable to be reached



How do I use the patient onboarding script?

Use this script to guide your conversation with the patient during the CHE scheduling portion of the patient onboarding call.

The script can be found on the VillageWeb

EYNTK TO SCHEDULE A TELEHEALTH CHE

Comprehensive Kidney Care Contracting (CKCC) Program

CKCC Patient Onboarding Script

Table of Contents:

- Introduction
- Voicemail Script
- Greeting Patients
- Barrier Capture
- Call Back Scheduling
- Consents
- PAM Patient Activation Measure
- Insurance Verification
- Wrap Up

Introduction

Purpose:

- This engagement script is to support teammates who are onboarding patients to the CKCC program.

Onboarding includes:

- o Program Introduction
- o Consents
- o CHE scheduling
- o PAM

- This script is meant to be a blueprint of how to explain the CKCC program to patients.
- The intention is for the teammate to sound non-scripted and have a genuine conversation with the member. The teammate has permission to use their own words, transition phrases and descriptions of the program, in line with descriptions below.
- The teammate is expected to provide an explanation of the program, gather, and enter appropriate information into Corner, get digital consents signed, and provide excellent customer service.

Preparation:

- o It is important to be prepared for these conversations
- o Please take time to practice with a fellow teammate before using this script
- o It is also important to be very familiar with all the steps in Corner/Flourish/VSEE/Telecom Systems so that the conversation flows well as you are navigating between screens and documenting the outcome of the conversation.



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EYNTK TO SCHEDULE A TELEHEALTH CHE

Documenting Scheduling Outcome: Activity Log Details

Each outreach attempt the CC completes must be documented in the Cerner Activity Log as a Communication Event

Activity Log (5)

Date/Duration	Initiated/Type	Outcome
02/11/2021 11:45 (5 min)	Phone call (Outbound)	Case discussion
02/11/2021 11:05 (5 min)	Phone call (Outbound)	Case discussion
02/09/2021 07:17 (15 min)	Phone call (Outbound)	Case discussion
02/04/2021 11:39 (3 min)	Phone call (Outbound)	Received referral
01/01/2021 11:26 (20 min)	Phone call (Outbound)	Case discussion

Reminder! Only open the patient charts that you are assigned to work on

01 Navigate to the Activity Log and click + to add a new Communication Event

02 Select the date and time of the outreach attempt

03 Select the method of contact (phone)

04 Select outbound contact

05 Select the contact type (e.g., patient)

06 Input the contact name

07 Select the Outcome

08 In the notes section include more detail about the outreach



EYNTK TO SCHEDULE A TELEHEALTH CHE

Documenting Scheduling Outcome: Activity Log

CC to include the information below within the notes of the Communication Event

Outcome

- Confirmed Appointment
- Declined
- Invalid Phone Number
- Left Message – Person
- Left Message – Voicemail
- Line Busy
- No Answer
- Rescheduled Appointment
- Wrong Phone number

Notes

DOCUMENTED IF CONNECTED

- If Confirmed Appointment:
VSee visit number
- If Declined: reason for decline (e.g. doesn't have or not comfortable with technology, prefers in-person, etc.)
- If Rescheduled Appointment:
VSee visit number

Important! Always include the VSee visit number in your note within Communication Event



EYNTK TO SCHEDULE A TELEHEALTH CHE

Documenting Scheduling Outcome: Activity Log Details

CC to document all scheduling attempts using the CHE Scheduling PowerForm

01

Navigate to the CHE Outreach PowerForm form
(See next slide for details)

02

Select "CHE" as Reason for Call

03

Select the patient contact status

04

Select the correct telehealth call outcome (if "connected" Patient Contact Status)

05

If the scheduling attempt was successful, enter the VSee Visit #

06

If unable to schedule, select the reason

07

Select Callback Date & Time (if patient requested callback selected as Call Outcome)

08

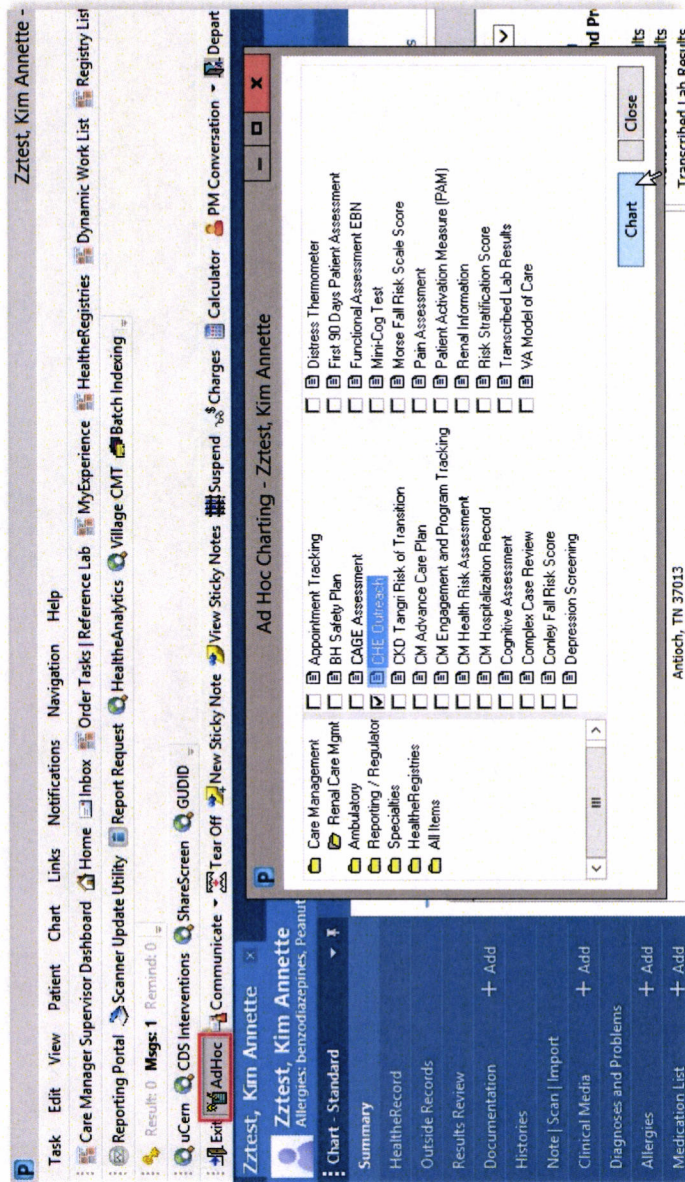
Sign and Close by clicking Green Check Mark



EYNTK TO SCHEDULE A TELEHEALTH CHE

Documenting Scheduling Outcome: PowerForm

CC to document all scheduling attempts using the CHE Scheduling PowerForm





EYNTK TO SCHEDULE A TELEHEALTH CHE

EYNTK: CHE Scheduling

- What is a CHE and what is telehealth?
- How do I select a patient to schedule?
- How do I call a patient?

How do I schedule the visit in Vsee?

- How do I schedule the visit in Cerner?
- How do I enter a patient's insurance information in Cerner?
- What do I do after the visit is scheduled?
- What do I do during the visit?
- Where can I get support?

JAC

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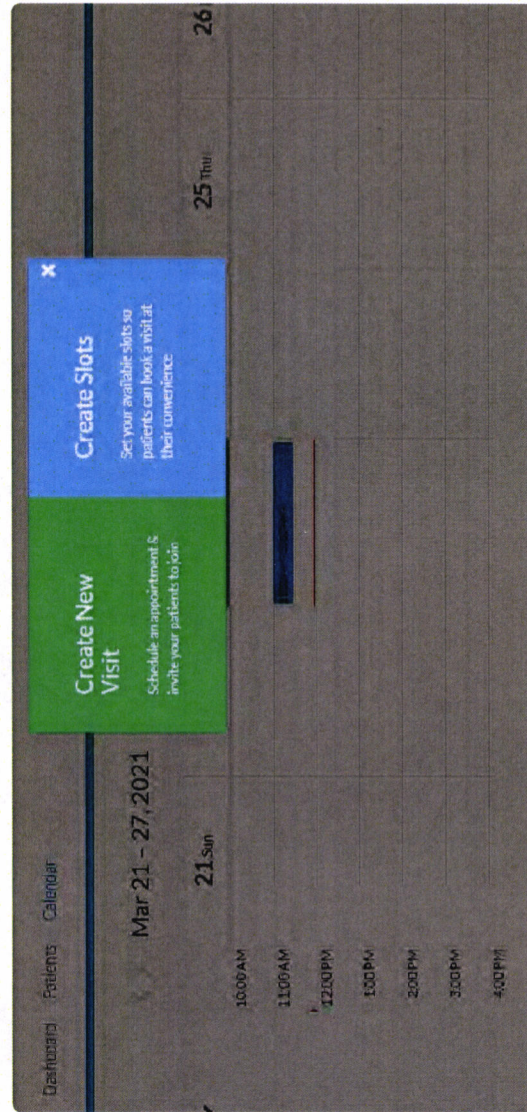


EYNTK TO SCHEDULE A TELEHEALTH CHE

Schedule an Appointment

01

Click on a time slot on the calendar to schedule an appointment.



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Schedule an Appointment

- 01** Click on a time slot on the calendar to schedule an appointment
- 02** Confirm the date and time
- 03** Choose the nurse practitioner who will be completing the appointment with the patient (care coordinators and VHES will be assigned to the nurse practitioners in their market / program)
- 04** Choose the correct room if the provider belongs to multiple rooms
- 05** Choose a visit option. If scheduling a CHE, select CHE. If scheduling a test visit, select General Telehealth Visit.
- 06** Search for a patient and choose the patient on the list.
- 07** Or create a new patient if needed.

EYNTK TO SCHEDULE A TELEHEALTH CHE

Create New Visit

Time *

NOW

LATER

03/23/2021

11:30

Does not repeat

Add Provider *

Elizabeth Davoren - elizabeth.davoren@davita.com

Visit Type *

VIDEO

PHONE

IN PERSON

Visit Option *

General Telehealth Visit (30 mins)

Add Patient *

Search by name, email, phone # and more...

Patient will be notified automatically via email and text message

MORE OPTIONS

+ Other guest

+ Reminder

CANCEL

CREATE VISIT



Scheduling the Visit in VSee: Create a Patient

To create a new patient:

- Always include the patient's MRN (**Cerner ID**), first name, last name and either the patient's email, or their phone number when creating the visit
- **Email or phone number must be included, both are recommended if the patient accepts**
- If the patient would like to receive the confirmations and reminders via email, include their email address
- If the patient would like to receive SMS text message confirmations and reminders, include the patient's phone number
- In this case, please let the patient know that their mobile provider's standard rates for sending and receiving text messages still apply
- Remember to update the patient's time zone if needed

EYNTK TO SCHEDULE A TELEHEALTH CHE

The screenshot shows a 'Create Patient' form with the following fields:

- First Name
- Last Name
- Email
- MRN
- Gender
- Date of Birth
- Address
- City
- State
- Zip
- Primary Care Physician Name
- Primary Care Physician Phone
- Timezone
- UTC Offset

Buttons: Cancel, Create

EYNTK TO SCHEDULE A TELEHEALTH CHE

- Create New Visit

Time *

NOW

11:30

DATE

03/22/2021

Does not repeat

▼

Add Provider *

Elizabeth Davoren - elizabeth.davoren@daivita.com

▼

Visit Type *

VISIT

PHONE

IN PERSON

Visit Option *

General Telehealth Visit (30 mins)

▼

Add Patient *

Search by name, email, phone # and more.

Patients will be notified automatically via email and text message

MORE OPTIONS

+ Other guest

+ Reminder

MONITORING

ADD OTHER GUEST

CANCEL

Add other guest

Include others in the call when scheduling (New arrival will receive an alternate number for this visit, not a waiting list)

SEARCH

ADD

REMOVE

REMOVAL

REMOVE

ADD

Reminder

Send email to: NANCY.WATKINS@DAIVITA.COM

▼

1 hour before *

1 hour before

1 hour before

1 hour before

2 days before *

2 days before

2 days before

2 days before

3 days before *

3 days before

3 days before

3 days before



Schedule an Appointment

EYNTK TO SCHEDULE A TELEHEALTH CHE

Confirm New Visit

Time	03/23/2021 12:30 GMT-06:00
Visit Type	Video
Room Name	Kristina Avery's Clinic
Visit Option	General Telehealth Visit
Patient Name	Kristina Avery
Provider Name	Kristina Avery
Reminder	1 day before

BACK

CONFIRM

Click on "CONFIRM" button.

New Visit Confirmed

Time	03/23/2021 12:30 PM GMT-06:00
Visit Type	Video
Visit Option	General Telehealth Visit
Patient Name	Kristina Avery
Provider Name	Kristina Avery
Room Name	Kristina Avery's Clinic
Reminder	1 day before
Telephone:	+1.650.758.0255
Meeting PIN:	446174

GO TO VISIT PAGE

- Click on "GO TO VISIT PAGE" to review the visit now or "X" button to not view it now.
- Click on "GO TO VISIT PAGE" to find the VSee visit number that needs to be documented in Cerner.



EYNTK TO SCHEDULE A TELEHEALTH CHE

Educating the Patient on VSee

At the time of scheduling, CC will educate the patient on VSee Clinic technology



- Each patient will have received the telehealth tip sheet in their welcome packet
- Let the patient know that video requires data usage and it is recommended that they connect to a secure Wi-Fi network.
If patient is not connected to Wi-Fi, message and data rates may be applied and are the patient's responsibility



EYNTK TO SCHEDULE A TELEHEALTH CHE

Educating the Patient on VSee

At the time of scheduling, CC will educate the patient on VSee Clinic technology

IF THE PATIENT CANNOT COMPLETE THE VISIT INDEPENDENTLY, AND/OR DOES NOT HAVE ACCESS TO TECHNOLOGY

If the patient does not have the required tools for a telehealth visit, the CC should ask the patient if they have a care partner or family member that can assist them